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ABSTRACT

Preliminary findings of a study of assistance personnel, or "change agents," in urban school improvement programs, failed to show an association between the effectiveness of educational change agents and any particular skills they employed. The study did isolate a nummber of general and specific skills that study participants identified in change agents. The study sought to determine styles and approaches typical of successful agents, skills essential to guiding change, and methods that had proved effective for training outstanding agents. A conceptual framework was developed that related agents' entry characteristics and behaviors with the outcomes of the school improvement programs. Data were collected through 137 semistructured interviews and observations focused on the activities of 17 experienced change agents. Five of the agents participating were engaged in one school improvement program and six each were engaged in two other programs, all in New York City. The interviews were conducted with the agents themselves, with their clients in the schools, and with their program managers. The skills examined were suggested by interviewees and were organized into clusters. Among the general skills observed were interpersonal, training, group-related, writing, listening, content-related, and communicating skills. More specific were initiation, rapport-building, task-oriented, social psychological, educationally focused, and autonomy-increasing skills. Two data tables are included. (PGD)

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"THE REAL THING": WHAT SKILLS DO EFFECTIVE CHANGE AGENTS NEED? SOME PRELIMINARY FINDINGS FROM THE FIELD *

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Introduction

The Problem

It is clear that "effective schools" improvement programs are expanding rapidly through American education. A nation-wide survey by Miles & Kaufman (1984) found a total of 49 such programs, being used in 34 states, 1750 school districts, and 7476 schools, over double the number found in a 1983 survey (Miles, Farrar & Neufeld, 1984).

Many of these programs rely on special "assisters " to act as consultants and facilitators---sometimes known as "change agents". Their role seems crucial, because school improvement programs take much time and care, are an effort to change the school as an organization, and often have to compete with the ordinary demands of keeping school running.

The 1984 survey found 2,461 "assisters"; they were mostly professional educators (central office specialists, principals, teachers, university professors, regional and state agency people). But school improvement assisters are often new to their jobs, and poorly trained and supported for the complex job of supporting school change efforts. There are few if any college or university inservice courses that deal with the skills they require.

As Hood (1983) has noted, much prior work on this topic (ex: Nash & Culbertson, 1977; Butler & Paisley, 1978) has been more "prescriptive and logical than descriptive and empirical". Many conceptual lists of assister roles have been offered with little data to back them up. This picture has

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* Read at the American Educational Research Association meetings, Chicago, April 1985.

improved somewhat recently: see the useful syntheses by Louis (1981) and Fullan (1981), and several large-scale studies (Louis, Kell et al, 1981; Loucks, Cox et al, 1982; Firestone & Corbett, 1981).

But we still do not have any very satisfactory catalogue of assister functions; we do not know which specific behaviors are crucial for success; and we do not know just how to train people for the needed skills.

This latter point is at the heart of our project. Since the change agent role is a crucial "leverage point" for the success of effective schools programs, it seems likely to us that any effort devoted to well-grounded, systematic training of change agents, and diffusing such training methods widely in American education will have substantial payoff.

Project Background

Beginning in April of 1983, we[1] have been conducting a study of assistance personnel, collaborating with three school improvement programs in New York City, which we will pseudonymously call Effective Schools Program, Constituency-Based School Renewal Program, and Teacher Growth Program.

In essence, the project is a practical effort to look carefully at what makes for successful change agent behavior---and then to turn that knowledge of "what works" into widely-diffusable training materials to help improve change agent performance in other settings. The core idea is to ground the training in direct knowledge of what change agents are really up against.

We have a data base of 137 semi-structured interviews and observations, conducted with 17 assisters, their clients in schools, and their program

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[1] The project, titled "Patterns of Successful Assistance in Urban School Improvement Programs", has been staffed by Ann Lieberman, Matthew B. Miles, Ellen R. Saxl, Lin Goodwin, Sharon Piety-Jacobs, and Vernay Mitchell. It is a collaborative venture of Teachers College and the Center for Policy Research, with support from New York Community Trust, the New York State Education Department, and Danforth Foundation.

managers. This paper is based on a first rough analysis of these data; we consider the findings highly preliminary, and expect to be surprised as we proceed further.

What Do We Mean by "Skills" of Assistance?

This study was designed to provide us with a greater understanding of how successful assistance personnel operate in urban school improvement programs. The purpose was to answer these underlying research questions:

1. What are the typical styles and approaches of successful assisters in such programs? What aspects of their work seem critical in insuring program success and increased pupil achievement?
2. Is there a basic set of core skills that are essential for high performance on the part of those responsible for aiding school improvement programs?
3. What systems and approaches for supporting the learning of key personnel aid outstanding performance?

We were also interested in seeing whether assister skills were generic, or in certain instances, program-specific. And we wanted to know whether the skills got played out differently in the strategies chosen by the assister---at separate stages and in different settings. Our intent was to focus on the delivery of services in order to learn about these skills in the actual context of daily school improvement efforts. As we have said, our ultimate goal was to use these findings to shape a grounded, useful training program for present and prospective assistance personnel in school improvement programs.

Early in the study, we developed a more extensive set of research

questions that sharpened our focus on the programs, the assistance personnel, the contexts in which the assisters worked, and the school-based outcomes of the school improvement process. The questions centered strongly on the assisters themselves: their entry characteristics, behavior on the job, learning and support and stages of work.

These questions, along with an extensive review of relevant literature, guided our preliminary investigation and resulted in a conceptual framework that showed, from our perspective, how the pieces of the assister's work fit together (see Figure 1). The central component of the conceptual framework outlines the elements of the assister's behavior: the mission, style, skills, strategies and tactics conceived of as the actual delivery of behaviors to clients. Clearly influencing their behaviors are the assister's entry characteristics, the school improvement program conditions, the school and district characteristics and the assister's learning and support systems. The final list of outcomes was used to show the impact of the school improvement process on the school, and, more specifically, as criteria to assess the assister's use of skills in a specific context.

What do we mean by the term "skill"? Generally, we considered it an attribute of the assister that was expressed in our data with a qualitative emphasis ("good"..."poor"..."terrific"). The emphasis is on <u>capabilities</u>; the person knows "how to" do something. Skills in this sense are building blocks or tools, which can be used in many different strategies or tactics.

The skills delineated in our coding scheme were not selected a priori but were derived from data in our pilot interviews with assistance personnel, program managers and school-based clients. We initially sorted skills into <u>general</u> categories that all assistance personnel would be likely to use (for example, communication, human relations, group process and training skills).

Fig. 1

PRELIMINARY CONCEPTUAL FRAMEWORK

Patterns of Successful Assistance in Urban School Improvement Programs

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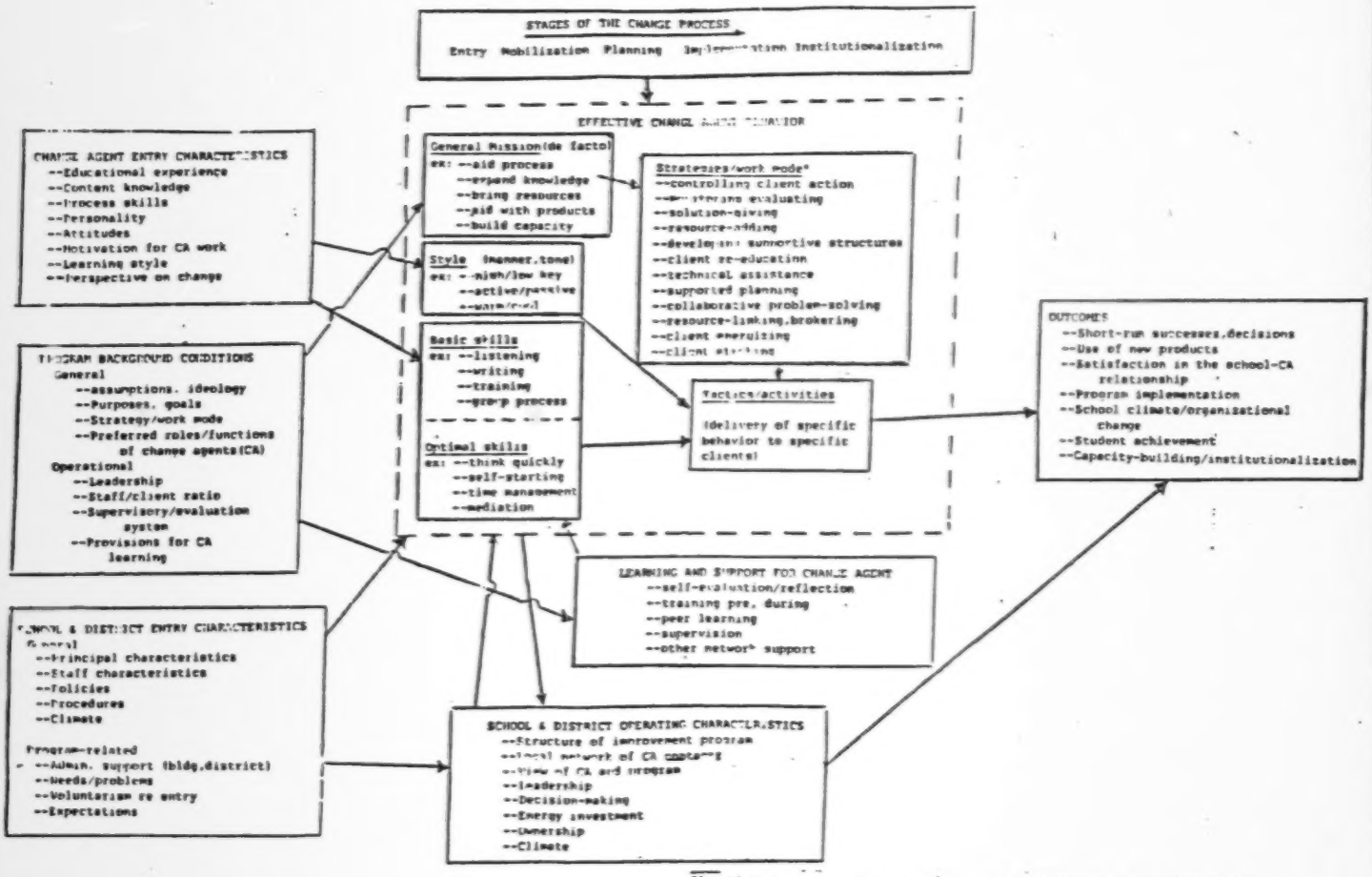

*Any given program, and any given CA, will be carrying out a characteristic "strategic mix" employing these components. The components are arranged from most to least directive.

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Through more careful analysis of the data, we were able to distinguish specific skills, such as initiating, managing, diagnosing, building trust and knowing how to get resources. Interviews and observations provided us with concrete examples of assisters using these skills in communicating with teachers and administrators, establishing planning groups, collaboratively mounting school projects and generally helping school personnel to become involved and successful in the initiation and implementation of school improvement programs.

Further review of the data helped us understand that assistance personnel use a combination of skills in different strategies or work modes. For example, here's an assister's report:

> Skills used during this phase have been confrontation; knowing when to call in the program manager; steps toward rejuvenation; allowing them to vent emotions; task orientation and task completion; expressing sympathy/empathy.

To illustrate further: the strategy of energizing and motivating clients to work on school improvement projects might incorporate the skills of initiating, managing, idea creation, rapport development and confidence building. Serving as a resource-adder or resource linker, a common strategy for assistance personnel in all these programs, often required the skills of diagnosing needs and knowing how to get resources as well as building the client's confidence and capacity to use these resources wisely.

Our coding system applied to the interview data allowed us to categorize the skills used by assisters; in principle , they can be integrated into a series of strategies and tactics that lead eventually to improvement outcomes, such as short-run successes, use of new products, organizational change, and student impact.

Our effort to describe and understand the range of skills in the behavior

of effective assistance personnel is still in progress. It will be several months before we have an analysis adequate for our purpose of designing a training curriculum for individuals engaged in these roles.

Research Methods

Instrumentation

Based on the research questions and conceptual framework, we developed semi-structured interview guides for use with assisters, their clients in schools (typically teachers, principals, parents), and their program managers.

For example, the first interview with an assister asked about "a typical work day", then the story of work with a particular school, its outcomes, and how the assister's work had affected them. It was followed with a visit to the school, where interview questions were asked about the school context, its involvement with the improvement program, the history of work (often 2-3 years), specific incidents involving the assister, the skills exhibited, and the outcomes achieved.

A first interview with the program manager focused on the program's assumptions, history and policy. The second interview asked about what particular assisters had brought to the program in the way of skills, what they had learned along the way (and how), and what were the most typical skills in play. We also asked about key skills the program required, and asked for advice about training for them.

We also asked managers and assisters alike to fill out a profile of assisters' typical strategies, tactics and skills, along with typical outcomes they felt they had achieved.

Data Collection

Our basic sample was 17 assisters, 5 or 6 in each of the three programs. All had had at least two years of experience in their programs. For each assister, we visited a school where they had been working for at least a year.

Interviews were held at the program office and at schools. The interviewer took notes organized under each interview question. Running notes were taken during the informal, less-structured interviews that often took place during a visit, and during informal observation of meetings, classroom work, and workshops. The typical full-fledged school interview took about 45 minutes; program manager and assister interviews ran from one to 1 1/2 hours. During the typical first school visit, 3 to 5 teachers and the principal were interviewed; for six of our 17 school sites, we had a follow-up visit, often repeating contacts and adding new ones.

Data Analysis

The field worker's notes were coded with a detailed scheme built around the conceptual framework and research questions, then directly transcribed into computer files with our faithful XYWRITE II word processing program. Notes were entered as "chunks" of one to several sentences, each with codes attached.

The field worker also reviewed the complete interview, and filled out a summary sheet, organized by the codes, to provide an integrated picture of the data. This was done individually for the program manager and assister interviews, and for the school interviews taken together. The summary sheet was also entered into the computer data base.

Each data "chunk" was also assigned "tags" to permit easy identification of retrieved chunks according to the assister, the program, the school, and

the interview guide or observation involved. All the data files were stored in the FYI 3000 data base program, which permits search and retrieval of chunks according to codes, and according to any word or combination of words in the total set of files.

For purposes of this paper, we retrieved all chunks referring to skills, both general and specific, printed them, and hand-sorted them for the summary analysis that appears below.

Preliminary Findings

Assister Effectiveness

Based on the data from program managers and assisters, we had originally sorted the assisters from each program into those that we believed were operating in an "outstanding" way, and those who were functioning very adequately. We had hoped to be able---as in the effective schools literature--to be able to see whether high-performing assisters had skills not shown by average or adequate assisters.

Our preliminary finding here is a non-finding. Based on a rapid scan of the "outcome" data for each program, there does not seem to be any clear basis for saying that the assisters can be discriminated by outcomes achieved. Secondly, the skills data reported below do not show any clear-cut difference between those assisters we categorized as outstanding or adequate. This non-finding deserves further careful verification, of course, but for now we must remain skeptical about the existence of "hero change agents".

Assister Skills--General

A summary of our analysis of general skills appears in Table 1. Before we

review it, we should make some caveats. This is a first, very rough pass through the data. Though the Table speaks of "confirmation", all we mean is that the skill was mentioned by more than one respondent when a particular assister is concerned. Secondly, the Table atomizes, takes apart the combination of skills possessed by any one assister, showing only general frequencies. Still, as we shall see, this first cut is illuminating.

The second prefatory need is for us to summarize the nature of the three school improvement programs involved. Each assister was working in a program context, which deeply affected the skills required and delivered.

First, the Effective Schools Program is typical of many such improvement programs around the country; it is built around the set of "five factors" originally identified by Ron Edmonds, and includes stages of forming a planning committee, assessing needs, setting goals, making a plan, and implementing it. Assisters in the program typically work in pairs within their schools, usually covering three to four schools.

The Constituency-Based School Renewal Program is also a comprehensive planning program, but it does not center specifically on the five factors. It places considerable emphasis on mobilization of all constituencies in and around the school, providing initial intensive training in group and organizational change skills, and then supporting an extended local planning and implementation process. The assister works with a part-time partner from the school district office, covering a total of six or seven schools.

The Teacher Growth Program is directly aimed at enhancement of the skills of individual teachers, through the provision of materials in a resource room, individual coaching and support in the use of new methods and content, staff development workshops, and after-school courses. One assister works with a school, while providing less-intensive outreach services to several other schools.

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TABLE 1
SUMMARY: GENERAL SKILLS OF ASSISTERS, BY PROGRAM

Skill type, with examples	CSR Program ((N=5))		ES Program (N=6)		TC Program (N=6)		TOTAL (N=17)	
	Present*	Confirmed*	Present	Confirmed	Present	Confirmed	Present	Confirmed
Interpersonal: Marvelous skills in dealing with people, always patient, never critical,very enthusiastic..not taking things personally, honest, not phony.	1	1	6	4	6	4	13	9
Training: Good presenter, delivers workshops...taught us consensus decision-making..role playing in small groups.. Cates training, teacher effectiveness training.	4	3	4	0	4	2	12	5
Group-related: A process person, can run meetings...lets the discussion flow..,adds suggestions but doesn't take over...gets things going, facilitates process.	4	1	3	0	3	1	10	2
Writing: Did needs assessment in a narrative; a pleasure to read..helped write proposal--they got it..writing well organized.	2	0	2	0	2	0	6	0
Listening: A listener to students, teachers, administrators.. listens to us and takes us to heart..listen and hear in a non-judgmental way.	0	0	2	0	3	1	5	1
Educational content: Master of craft...knowledgeable about schools and education...knows a lot about reading programs.	0	0	3	0	2	0	5	0
Communicating/speaking: Communicates well, good conferencing skills...speaks actively and directly.	0	0	0	0	2	0	2	0

*"Present" means that the skill is mentioned for this assister by at least one respondent (self, manager or client).
*"Confirmed" means that the skill is also mentioned, for this assister by at least one other source, or by several.

Some summary comments: not surprisingly, the most widespread skills are those of the person. They are most crucial in the TG and ES programs, where much depends on trust and rapport. Training skills are a close second, though they are less often confirmed by a second report. Group skills are frequently used, even in the individually-oriented TG program. Actual writing skill is not infrequently mentioned, along with listening. Both the TG and ES programs mention educationally-specific skills. We suspect that the low frequency of communicating/speaking stems from its being taken for granted as a "floor" skill which assisters must naturally have. It's also of some interest that no one mentioned another "floor" skill---that of being able to read rapidly and well.

Next we turn to more specific, detailed skills. We might preface this by noting that there was a flood of such material---perhaps four to five times more, and far more detailed, than those skills noted above. Table 2 displays summary information.

Table 2 organizes the specific skills in clusters. After the skill of "initiation", there is a cluster of rapport-building skills (trust and humor), then a task-oriented cluster including diagnosis, planning, management, and one of our favorites, "tenacity." Conflict, collaboration and negotiation skills emphasize the social psychology of the enterprise. The next cluster focuses on educational substance, and includes idea-bringing, resource provision, program implementation, and demonstration. Finally, confidence-building and independence-building emphasize improvement of local capacity.

TABLE 2
SUMMARY: SPECIFIC SKILLS OF ASSISTERS, BY PROGRAM

Skill type, with examples	CSR Program (N=5)		ES Program (N=6)		TC Program (N=6)		TOTAL (N=17)	
	Present*	Confirmed*	Present	Confirmed	Present	Confirmed	Present	Confirmed
Initiation: Not afraid of his job, not afraid to step on toes..prods people, keeps them moving..never runs out of ideas and energy.	0	0	4	2	4	1	8	3
Trust: Building rapport..can't use word "confidential" lightly..be accepted by both sides as helpful..checking whether OK to share thing .people don't hesitate to talk.	2	0	5	2	6	5	13	7
Humor: brings levity to the situation...comical, knows when to press, when to stop...fresh, done with a smile.	0	0	3	0	2	1	5	1
Diagnosis: see what important is happening, but not look like you're looking...analyzing, taking it all in..asks just the right questions..reads between the lines,sizes up.	3	1	5	4	5	4	13	9
Planning: helped with the action plan, refining..set the agenda items..logistics..helped me see the channels I should go through.	4	1	2	1	2	1	8	3
Managing:made us come together as a body..monitoring and evaluating progress..everything prepared in advance.. highly organized..keep on top of our efforts, lend a hand.	5	1	4	1	6	5	15	9
Tenacity: he never wavered...we could always rely on him.. ability to be patient is pivotal..doesn't give up.	2	0	3	0	1	0	5	0
Conflict: constantly mediating.."back off, you're going to get killed"..negotiated for new science position..softened attitudes with non-threatening ideas.	4	0	6	6	1	0	11	6
Collaboration: helping principal move away from "top down".. committee really functions well..lead and direct, but not like professor/student, but as peers..brings ideas together.. getting people involved, with their different agendas.	2	1	6	3	5	1	13	5
Relationship negotiation. Played linking role..worked just right with principals..keep your eye out for what's needed, negotiate for it..knows how to get around red tape.	2	1	1	1	3	0	6	2
Idea-bringing: gives ideas...doesn't hold back...gives own opinions.	0	0	2	0	2	1	4	1
Resource provision: scrounging stuff..found us consultants.. has bank of knowledge...if it's broken he fixes it..uses his network to get us supplies..gathered current materials.	3	1	5	2	5	4	13	7
Demonstration: does lessons for teachers..modeled time on task..demonstrated classroom management..watching someone teach my class makes me reflect on what I'm doing.	2	0	1	0	6	5	9	5
Implementation: helped them through the components of new reading program..got the model in place..helped with testing program..development of curricula.	0	0	2	0	3	1	5	1
Confidence-building: made it possible for teachers to assert their rights..people didn't lose self-worth..makes you feel you're most impoprtant person on face of the earth..injects a great deal but you feel powerful.	2	1	2	1	5	3	9	5
Independence-building: training us to work out things ourselves..showed them how to network, and that you have to "stand the heat"..weaning process..when it works, they get the credit.	3	2	5	1	4	1	12	4

*"Present" means that the skill is mentioned for this assister by at least one respondent (self, manager or client).
*"Confirmed" means that the skill is also mentioned, for this assister by at least one other source, or by several.

Comments. As we examine Table 2, some preliminary conclusions about the critical nature of several skills seem clear. First, managing stands out as the most frequently cited skill; it is often confirmed. It is an important factor in all three programs, named for 15 of the 17 assisters. The emphasis on managing helps us understand the need for a specific individual to assume the responsibilities of mounting, supervising and "orchestrating" a school improvement program. The cycle of school improvement does not just happen as a fortuitous aspect of daily operating procedures. The varied aspects of managing also underscore the complexity of the assister role, illuminating the assisters' need to manage their own time and resources as well as the stages of the school-based activities.

Other prominent skills appear in each of the clusters of Table 2. Trust is mentioned for 13 assisters, bearing out its close relationship to the interpersonal skills that weighed heavily in the general skills displayed in Table 1. Understandably, trust skills are most often cited in the TG and FS programs, where there is heavier presence of assisters in schools. CSR assisters divide their time among more schools, and rely more heavily on well-trained local personnel.

The task-oriented cluster leans heavily on the skills of managing, already mentioned, and diagnosis. Both skills are highly visible in data from all three programs. Interestingly, a close look at the data shows that diagnosis is an ongoing process, implying assister ability to analyze and respond to contextual needs at all stages in the process.

Conflict and collaboration skills appear in all program contexts, although conflict is mentioned only once in the TG program. Our preliminary explanation is that the central focus of the TG program is the relationship between the assister and individual teachers; the process is not dependent on the

cooperation of several role groups. It is more likely that conflict will emerge in the other two programs with the establishment of working committees based on new relationships among representatives of various constituencies. Collaboration, however, plays a prominent role in the advancement and eventual success of all programs. The message is that both conflict and collaboration skills are needed; school improvement does not rely on one or the other.

Data related to the cluster of skills involving educational substance support the notion that providing resources is an essential element in school improvement. A critical aspect of the assister's role is linking the school to new ideas, materials, people, sources of funds and structures that foster participation in the school improvement process. In effect, the assister's personal skills are enhanced by the skill of knowing where to find, and how to bring additional resources to the often-closed system of the school---along with the skills of networking or linking people for future resource exchange.

Within this same cluster, demonstrating or modelling new techniques of teaching or classroom management are central to the success of the TG program. This clearly differentiates TG from CSR or ES, where the emphasis is more centrally on facilitating the school-based planning and implementation process.

All the programs address the need to build their clients' confidence to participate in and conduct the programs' components. Capacity or independence-building is also central to the institutionalization process; the school must ultimately take on the major responsibility for diagnosis and remediation of needs in order to keep fulfilling the goals of school improvement.

These conclusions are based on a preliminary review of the data, and will undoubtedly be extended and revised during further analysis. It is encouraging, however, to begin to see the shape of key assister skills, as they are driven by

the nature of the improvement programs and the school settings where the crucial function of assistance takes place.

Research and Development Agenda: Next Steps

These preliminary findings provide the basis for some judgments about the assister skills that appear frequently in the work of effective assistance personnel. Our next step is further data analysis, exploring more deeply the relationships between specific skills and the settings in which they are used. For example, how or to what degree are specific skills applied in different program stages? Do we, in fact discover that trust building/rapport or supported planning appear significant only in the early stages or are they ongoing processes? Where does resource-linking fit into the picture? Does building confidence or independence in clients proceed from the start or are these skills utilized after the assister has laid the groundwork for the program in the school?

We are also quite sure that the nature of the local school setting (as noted in our conceptual framework) is a powerful conditioner of what skills will be needed to carry out appropriate strategies.

Our intent to develop a training curriculum also prompts us to investigate in more detail the range of skills that change agents bring to their jobs, learn in program training sessions or develop through on-the-job experiences. These data, in conjunction with suggestions for training from the assisters and program managers will round out our analysis of critical core and program-specific skills for assistance personnel.

Answers to our research questions will be organized in a training curriculum for current and prospective assistance personnel. Training modules will be grounded in the reality of daily tasks and successes of the assisters in

our study. At present we are developing a workshop format to help change agents develop and extend these critical skills. We will test our workshop approach in order to see how the skills can best be introduced, learned and practiced with appropriate feedback. As we pilot these preliminary modules, we shall revise them in accord with our judgments of their efficacy and feedback from workshop participants - the assisters themselves.

These selected training experiences are being set in the larger context of a curriculum that can be piloted, revised and finally disseminated (probably in early 1986) for widespread use by others engaged in the ongoing learning and challenges associated with school improvement projects.

At the conclusion of this study, we hope to speak with some assurance about the way change agents operate effectively, how they use the skills they bring to the role, what and how they learn on the job, both through training and experience---and which skills can be successfully taught to individuals selected to assume change agent roles.

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